

AMENDMENT AND RESPONSE

Serial Number: 09/540,502

Filing Date: March 31, 2000

Title: CHANNEL DIRECTOR FOR CROSS-CHANNEL CUSTOMER INTERACTIONS

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IN THE CLAIMS

Please amend claims 1, 6, 11, 16, and 18 as follows:

- Sub B'7
1. (Amended) A method for managing the cross-channel interactions of a customer, comprising:
- identifying a first interaction on a first channel and a second interaction on a second channel;
  - identifying a customer associated with the interactions, wherein the interactions are occurring concurrently;
  - recording a dialogue corresponding to the first and second interactions; and
  - using the dialogue to modify at least one of the interactions.
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2. (Original) The method of claim 1, further comprising:
- using the dialogue to modify at least one of the channels.
3. (Original) The method of claim 1, further comprising:
- identifying a first subject matter associated with the first interaction and a second subject matter associated with the second interaction;
  - connecting a first service provider to the first interaction based upon the first subject matter and the first channel; and
  - connecting a second service provider to the second interaction based upon the second subject matter and the second channel.
4. (Original) The method of claim 3, further comprising:
- enforcing a plurality of business policies for each of the channels and each of

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Sub B'7 the interactions; and

enforcing a plurality of customer profiles for each of the channels and each of the interactions.

5. (Original) The method of claim 4, further comprising:

alerting the first service provider to take a plurality of actions with the customer based upon the first interaction, the first channel, the first subject matter, the business policies, and the customer profiles.

A 6. (Amended) An apparatus for managing cross-channel interactions between a customer and a business, comprising:

a plurality of devices interfaced to [said] the customer;

means for identifying a first interaction on a first channel of one of the devices and a second interaction on a second channel of another of the devices;

means for recording a dialogue corresponding to the first interaction and the second interaction;

means for associating the customer with the first and second interactions, wherein the interactions are occurring concurrently; and

means for using the dialogue to modify at least one of the interactions.

7. (Original) The apparatus of claim 6, further comprising:

means for using the dialogue to modify at least one of the channels.

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Sub B 7 8. (Original) The apparatus of claim 6, further comprising:  
means for storing a customer profile associated with each of the interactions; and  
means for retrieving the customer profile associated with each of the interactions.

9. (Original) The apparatus of claim 8, further comprising:  
means for enforcing a plurality of business policies for each of the channels and  
each of the interactions; and  
means for enforcing the customer profiles for each of the channels and each of the  
interactions.

X 10. (Original) The apparatus of claim 9, further comprising:  
means for identifying a first subject matter associated with the first interaction and  
a second subject matter associated with the second interaction;  
means for connecting a first service provider to the first interaction based upon the  
first subject matter and the first channel;  
means for connecting a second service provider to the second interaction based  
upon the second subject matter and the second channel; and  
means for alerting the service providers to take a plurality of actions with the  
customer based upon the interactions, the channels, the subject matters, the business  
policies and the customer profiles.

11. (Amended) A method for managing the cross-channel interactions of a customer  
while the interactions are occurring, comprising:

concurrently establishing a session including a first interaction on a first channel

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Sub B<sup>c</sup> 7 and a second interaction on a second channel;

identifying a customer associated with the interactions;

recording a dialogue associated with the first interaction and the second interaction during the session; and

modifying at least one of the interactions using the dialogue before the session terminates.

12. (Original) The method of claim 11, further comprising:

modifying at least one of the channels using the dialogue before the session terminates.

13. (Original) The method of claim 11, further comprising:

storing a customer profile during the session; and

retrieving the customer profile during the session.

14. (Original) The method of claim 13, further comprising:

enforcing a plurality of business policies for each of the channels and for each of the interactions during the session; and

enforcing the customer profiles for each of the channels and for each of the interactions during the session.

15. (Original) The method of claim 14, further comprising:

identifying one of a plurality of subject matters associated with each of the interactions during the session;

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Sub B 7 connecting one of a plurality of service providers for each interaction based upon the subject matter associated with the interaction and the channel associated with the interaction during the session;

alerting one of a number of the service providers to take a plurality of actions with the customer based upon the interactions, the channels, the subject matters, the business policies and the customer profiles during the session.

16. (Amended) A method for customizing customer interactions which are initiated by the service provider, comprising:

A providing a customer profile database;  
storing in the customer profile database a plurality of concurrent dialogues occurring with a customer;  
initiating a service provider; and  
establishing an interaction initiated by the service provider with a customer extracted from the customer profile database wherein the interaction occurs over a channel.

17. (Original) The method of claim 16, further comprising:

extracting a customer profile from the customer profile database;  
enforcing a plurality of business policies for the interaction and the channel; and  
enforcing the customer profile for the interaction and the channel.

18. (Amended) A method for connecting a customer interaction to a service provider based upon the interaction and the subject matter of the interaction, comprising:

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~~concurrently establishing a first interaction on a first channel and a second interaction on a second channel with a customer;  
identifying a first subject matter associated with the first interaction and a second subject matter associated with the second interaction;  
selecting a first service provider for the first interaction based upon the first subject matter and the first channel;  
selecting a second service provider for the second interaction based upon the second subject matter and the second channel;  
connecting the first service provider to the customer through the first interaction;  
and  
connecting the second service provider to the customer through the second interaction.~~

19. (Original) The method of claim 18, further comprising:  
enforcing a plurality of business policies for each of the channels and each of the interactions; and  
enforcing a plurality of customer profiles for each of the channels and each of the interactions.

20. (Original) The method of claim 19, further comprising:  
alerting the first service provider to take a plurality of actions with the customer based upon the first interaction, the first channel, the first subject matter, the privacy policies, the business policies, and the customer profiles; and  
alerting the second service provider to take a plurality of actions with the

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customer based upon the second interaction, the second channel, the second subject matter, the business policies, and the customer profiles.